

Steps to Effective Interviewing:

1. Make necessary introductions and engage in small talk.
2. Explain what will take place during the interview.
3. Share your intentions and any hopeful results/benefits for the taxpayer.
4. Allow the taxpayer to share any expectations, needs, and/or concerns.
5. Respond with active listening skills.
 - A. Create a "safe" climate.
 - B. Remember your nonverbal listening cues.
 - C. Listen, then respond by:
 1. Restating,
 2. Paraphrasing, (and/or)
 3. Encouraging
6. Ask the first key tax question, creating an awareness about why the tax information is needed.
 - A. Make no assumptions.
 - B. Ask no leading questions.
 - C. Ask, "What have you brought with you today?"
7. Continue to ask questions. Define any terms that may be unfamiliar to the taxpayer.
8. Check your own comfort level.
9. Respond to any misunderstandings.
10. Continue with effective questioning and active listening.
11. Overcome any communication barriers.
 - A. Stay on track. ("I hear you."/repeat question)
 - B. Allow adequate response time.
 - C. Avoid making assumptions.
 - D. Deal with taxpayers.
 1. Silent ("tell me more about...")
 2. Upset (paraphrase)
 3. Concentrate.
12. Indicate the taxpayer's next steps. Educate the taxpayer about the Volunteer Return Preparation Program (VRPP) and stress the benefits of accurate recordkeeping.
 - A. Express confidence in having completed an accurate tax return.
 - B. Part cordially.